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SAN FRANCISCO DEPARTMENT OF CITY PLANNING

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PART I: MISSION BAY PROJECT AREA BUSINESS ACTIVITY, EMPLOYMENT AND LAND USE, 1985

INTRODUCTION

This report is one of about 20 special studies for Mission Bay. Part I of this paper and the accompanying tables describe existing conditions (end of 1985) in the Mission Bay Project Area in terms of business activity and land use. The description provides an overview of the types of activities and numbers of workers currently using the Mission Bay Project Area, as well as information on the characteristics of the workers and jobs. (Current residential use is limited to the houseboat community located in the China Basin Channel. Part II of the paper presents the characteristics of the residents, based on a survey of the members of the Mission Creek Harbor Association.)

The primary source of the information on business activities and employment is the Mission Bay Area Business Survey conducted by Recht Hausrath & Associates (RHA) in November/December, 1985. This was not a sample survey. RHA contacted representatives of all of the businesses in the project area. These businesses include tenants, sub-tenants, and sub-sub-tenants of Santa Fe Pacific (both Southern Pacific and Santa Fe properties), tenants of the Port of San Francisco, and some businesses on independently-owned property within the project area. RHA also received information from Southern Pacific regarding the commuter rail activity. Both telephone and in-person interviews were conducted. Some parts of the questionnaire required the businesses to fill out and mail back forms describing the characteristics of their workers. The questionnaire was modeled on the questionnaires used by RHA in both the C-3 District and South of Market/Folsom Employer Surveys conducted for the Department of City Planning.

The business survey was supplemented by land use information estimated from maps and aerial photographs of the project area. Both Santa Fe Pacific and the Port of San Francisco provided lease and land use

information enabling RHA to develop estimates of land areas in various uses.

The Mission Bay Project Area described by this setting information is the specific area that will be analyzed in the Mission Bay EIR and is outlined in Map 1. Generally, the area includes all land and activity bounded by Seventh Street on the west, Townsend Street on the north, Pier 62/China Basin Street on the east and Mariposa Street on the south. The exceptions to this overall boundary are the China Basin Building and associated parking north of the Channel, and the property in the southeast corner of the project area, at the northwest corner of Third and Mariposa Streets.

It is important to note that the Mission Bay Project Area is larger than the area that is contemplated for development by Santa Fe Pacific Realty Corporation, and which is the subject of the Department's efforts in producing a Mission Bay Plan. The primary difference is that the Mission Bay Project Area includes two parcels east of Third Street that are not included in the Plan area (as shown in Map 1): Parcel I (partially bounded by Mission Rock and China Basin Streets); and Parcel II (in the southeast corner, partially bounded by Illinois and China Basin Streets). Because some of the existing land uses occupy land outside the Plan area boundaries, all information in this paper is presented for the larger Mission Bay Project Area.

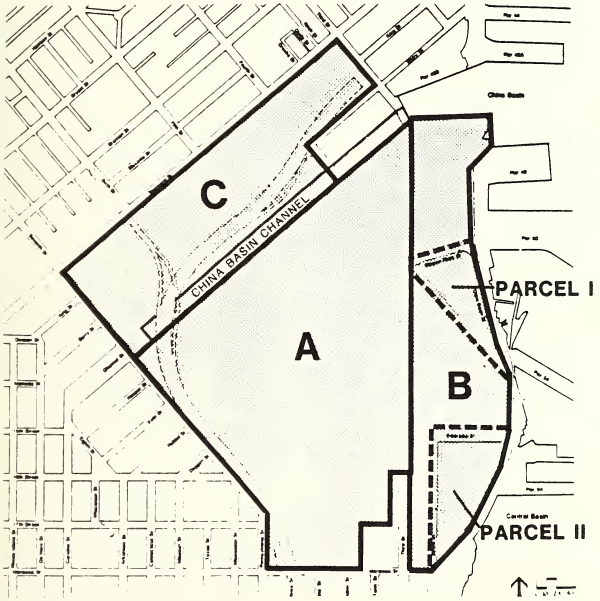
The Mission Bay Project Area has been divided into three subareas for the purposes of this setting description. Third Street and the China Basin Channel are the dividing lines. The subarea west of Third Street and south of the Channel is referred to as "West of Third Street", while the subarea closer to the Bay is referred to as "East of Third Street". The "East of Third Street" subarea includes Parcels I and II. The subarea north of the Channel is referred to as "North of Channel."

In the following sections, business activities and employment are described first, and important sub-groups cutting across the project area business activities are identified (freight rail users and mari-

MAP 1 : MISSION BAY PROJECT AREA

Showing subareas: A. West of Third
B. East of Third
C. North of Channel

Parcels I & II are not included within the Mission Bay Plan Area, but are included in the Project Area for purposes of identifying existing land uses and employment.



time-related activities). The land use characteristics of the area are summarized, in terms of building space and land in active use by businesses. Estimates are also presented of the total land area in the project area and how it is distributed among business and other use categories. There is discussion of trends in the project area and a comparison with previous estimates of project area activity. The last sections of Part I summarize characteristics obtained from the survey results. The occupation and wage/salary characteristics of the jobs in the project area are described, and the distribution of project area workers by place of residence is presented.

The businesses and employment in the project area have been categorized into business activity groups. These categories substitute for the Standard Industrial Classification (SIC) system, in order to provide a more useful classification based on the function of business establishments. The major benefit of this approach is that employment can be related to the types of space in which the businesses are located and to the factors which determine the location of business establishments. Businesses are categorized into business activity groups according to the primary function performed on-site.

In the Mission Bay Project Area, RHA has identified eight (8) business activity groups: Transportation and Related Services, Wholesale/Distribution/Warehouse, Vehicle/Equipment Storage, Manufacturing/Construction, Office, Retail/Restaurant, Arts/Design, and Other. Definitions and examples of these business activities are provided in Appendix A.

Overall

Table 1 shows the total number of establishments and total employment in the Mission Bay Project Area by business activity and location. There are a total of 113 establishments and 2001 employees.[1] If Parcels I and II (see Map 1) are excluded, there are about 108 establishments and about 1,700 employees in the Mission Bay Plan Area. Total employment in the project area represents less than one-half of one percent (0.3 percent) of citywide employment. Most of both the establishments (74 percent) and employment (57 percent) are located west of Third Street. The relatively high percentage of employment east of Third Street (33 percent) compared to establishments (22 percent) is explained by the one large retail establishment (the Esprit sales outlet) located in this part of the project area.[2] (The Esprit outlet is the primary business activity in Parcel II [shown in Map 1] which is not part of the Mission Bay Plan Area.) In the North of Channel subarea, the higher percentage of employment (10 percent) compared to establishments (four percent) is explained by the Caltrain commuter rail operations located there.

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[1] As stated in the note on Table 1, there were at least six other establishments identified in the project area in November/December 1985. Three of these were parking activities; they are not included in the totals since they had no employees based in the project area. RHA was not able to interview the other three establishments; they are relatively small operations (less than four employees); two had just moved into, and one was in the process of moving out of, the project area. The Channel Street Pump Station, located on City property within the project area, was not included in the survey.

[2] Interestingly enough, however, had the survey been conducted two to three years ago, there would have been another East of Third establishment with comparably high employment (244 employees). At the time of the RHA survey, that Transportation group establishment, feeling the effects of union difficulties and deregulation, was down to 23 office employees and about to move from the seven acre site it had occupied in the project area for 15 years.

TABLE 1

MISSION BAY PROJECT AREA SETTING - 1985
NUMBER OF ESTABLISHMENTS AND EMPLOYMENT BY BUSINESS ACTIVITY AND LOCATION (a)

	LOCATION															
	WEST OF THIRD				EAST OF THIRD (b)				NORTH OF CHANNEL				TOTAL (b)			
Business Activity	Establishments		Employment		Establishments		Employment		Establishments		Employment		Establishments		Employment	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Transportation & Related Services (c)	23	27.7	581	51.2	7	28.0	170	25.9	1	20.0	155	73.5	31	27.4	906	45.3
Wholesale/Distribution/Warehouse	16	19.3	365	32.2	4	16.0	32	4.9	--	--	--	--	20	17.7	397	19.8
Vehicle/Equipment Storage	11	13.3	49	4.3	6	24.0	12	1.8	2	40.0	40	18.9	19	16.8	101	5.1
Manufacturing/Construction	--	--	--	--	7	28.0	177	27.0	--	--	--	--	7	6.2	177	8.8
Office	22	26.5	106	9.4	--	--	--	--	--	--	--	--	22	19.5	106	5.3
Retail/Restaurant	4	4.8	25	2.2	1	4.0	265	40.4	1	20.0	3	1.4	6	5.3	293	14.7
Arts/Design	7	8.4	8	.7	--	--	--	--	--	--	--	--	7	6.2	8	.4
Other(d)	--	--	--	--	--	--	--	--	1	20.0	13	6.2	1	.9	13	.6
TOTAL	83	100.0%	1134	100.0	25	100.0%	656	100.0%	5	100.0%	211	100.0%	113	100.0%	2001	100.0%
Percent of total establishments	73.5%				22.1%				4.4%				100.0%			
Percent of total employment			56.7%				32.8%				10.5%				100.0%	

NOTE: There were at least six other establishments identified in the project area in November/December, 1985. Three of these were parking activities; they are not included in this table because they had no employees based in the project area. We were not able to contact for interviews the other three establishments. These uncontacted businesses are all relatively small (less than four employees); two had just moved to the project area; and one was in the process of moving out. The Channel Street Pump Station, located on City property within the project area, was not included in the survey.

(a) These employment estimates cover all workers based in the area, including those who work elsewhere much of the time, such as truck drivers and sales people. The next table identifies this group separately.

(b) These estimates include the establishments and employment in Parcels I and II east of Third Street which are not included in the Mission Bay Plan Area (see Map 1). If these parcels are excluded, there are about 208 establishments and 1,700 employees in the Mission Bay Plan Area.

(c) This category includes the commuter-rail operations.

(d) San Francisco Recreational Vehicle Park.

SOURCE: Recht Hausrath & Associates, 1985 Mission Bay Area Business Survey

There are several different types of businesses and employees in the Mission Bay Project Area. (See Appendix A - Description of Business Activities.) The largest number of both establishments and employees is in the Transportation and Related Services business activity. This group includes 45 percent of all employment in the project area, and most of these workers are located west of Third Street. About half (51 percent) of all employment west of Third Street is in this group. (This includes a relatively large proportion of workers, such as truck drivers and delivery persons, who spend most of their day away from the base of their business operations. These workers are described in Table 2.) The next largest business activity (in terms of employment) is the Wholesale/Distribution/Warehouse group. As with the Transportation group, almost all of this activity is located west of Third Street; there is no Wholesale/Distribution/Warehouse activity north of the Channel.

The West of Third subarea also contains all of the office activity. Although there are a relatively large number of office establishments (20 percent of total establishments), office employment represents just over five percent of total project area employment, reflecting the relatively small size of these businesses (less than five employees on average). Similarly, the Vehicle/Equipment Storage business activity represents a substantially lower proportion of employees than of establishments, reflecting the generally small amounts of employment associated with storage functions.

Relatively few of the businesses in the project area fit the definition of traditional industrial uses, i.e., businesses with primarily manufacturing functions, with a product that results from the assemblage and/or processing of raw materials. There are only seven establishments with a total of 177 employees in the Manufacturing/Construction business activity. All of these are east of Third Street. The two ready-mix concrete plants on Third Street (Kaiser Sand & Gravel and Diamond Building Materials) are the largest facilities, physically, in the group; three other establishments employ as many or more workers, however.

The largest employer in the project area (265 jobs) is the apparel manufacturer's sales outlet east of Third Street (Esprit); this establishment accounts for 90 percent of the employment in the Retail/Restaurant business activity. (This total number of jobs includes a relatively large amount--30 percent--of part-time jobs.) As noted earlier, the Esprit outlet is not included in the Mission Bay Plan Area. The second largest employer is a trucking and warehousing concern in the Transportation business activity with 175 employees (Dispatch Transportation). SP/CalTrain has 155 workers involved in commuter rail activity in the project area. There is a substantial drop in size to the next group of businesses: three wholesale distributors employing 70-80 people, one manufacturer with 70 workers, and five establishments in the Transportation group each employing 50-60 people. The bulk of the area's establishments (102) employ 40 or fewer people, with 13 establishments having no employees in the area on a regular basis. The business activity group with the smallest number of employees (eight) is Arts/Design, reflecting the individualistic nature of the seven businesses in this category.

On-Site/Off-Site Employment

Table 2 shows that over a third (38 percent) of the area's employees, while based in the project area, work elsewhere most of the day. The individual business activity groups show two extremes of variation along these lines, either generally off-site or generally on-site. In the Transportation and Vehicle/Equipment Storage business activities, a majority of the workers (56 percent and 69 percent respectively) are generally off-site. For the Transportation group, this is not unexpected, since, as noted earlier, this category consists predominantly of trucking, passenger transport, and moving establishments whose nature is defined by mobile employees. The largest employer in the group reports 100 (of its 175 employees) to be regularly dispatched from the headquarters in the project area. All of the trucking establishments stated that the majority of their employees came and went from the site on a daily basis, the frequency of daily trips depending obviously upon the nature of the commodity carried and the distance from the site involved in the job.

TABLE 2

MISSION BAY PROJECT AREA SETTING - 1985
EMPLOYMENT BY BUSINESS ACTIVITY

	EMPLOYMENT					
	Always On-Site (a)		Usually Off-Site (b)		TOTAL	
Business Activity	#	% of Total	#	% of Total	#	%
Transportation & Related Services	396	43.7%	510	56.3%	906	100.0%
Wholesale/Distribution/Warehouse	311	78.3%	86	21.7%	397	100.0%
Vehicle/Equipment Storage	31	30.7%	70	69.3%	101	100.0%
Manufacturing/Construction	123	69.5%	54	30.5%	177	100.0%
Office	66	62.3%	40	37.7%	106	100.0%
Retail/Restaurant	293	100.0%	--	--	293	100.0%
Arts/Design	8	100.0%	--	--	8	100.0%
Other	13	100.0%	--	--	13	100.0%
TOTAL	1,241	62.0%	760	38.0%	2,001	100.0%

NOTES:

(a) Includes workers based in the project area who generally spend their entire day at this place of work.

(b) Includes workers based in the project area who report to this work place but spend most of their time out of the area. This covers truck drivers, delivery persons, sales people, etc. Some of these workers come and go from the project area several times during a normal work day.

SOURCE: Recht Hausrath & Associates, 1985 Mission Bay Area Business Survey

The even higher percentage of workers off-site in the Vehicle/Equipment Storage category is explained by nine establishments which have their headquarters elsewhere, using their location in the Mission Bay Project Area only on an occasional basis, with no employees regularly stationed there, and six other establishments which are based in the area, but whose employees regularly leave the area to either obtain materials or objects (e.g., salvage, abandoned automobiles, etc.) or perform a service (e.g., construction contractor, pay phone coin collection).

Freight Rail Users

Freight rail use is defined to include only those establishments with facilities in the project area actually served by rail. Table 3 shows 13 (12 percent) of the total project area establishments to be users of freight rail lines. These 13 businesses account for 442 jobs, or 22 percent of the total project area jobs, and include four of the area's largest employers. The majority of the activity using freight rail service is located west of Third Street. There are no freight rail users north of the Channel. The frequency of rail usage reported varied from 4-10 cars per day, to two cars per month, to completely variable.

The largest single group of rail users consists of trucking/warehousing establishments in the Transportation business activity. Four of these are relatively new to the area (under five years), and two others have been there over 13 years. One of the newer trucking rail users is reported as probably the biggest railcar receiver in San Francisco.

Four other establishments (one in Transportation, two in Wholesale/ Distribution/Warehouse, and one in Vehicle/Equipment Storage) stated that they no longer used the rails, although some had, as recently as two years ago. Two additional establishments (both wholesale distributors) indicated an interest in using the rails in the future.

TABLE 3

MISSION BAY PROJECT AREA SETTING - 1985
FREIGHT RAIL USERS BY BUSINESS ACTIVITY AND LOCATION (a)

	LOCATION (b)					
	WEST OF THIRD		EAST OF THIRD		TOTAL	
Business Activity	Establishments	Employment	Establishments	Employment	Establishments	Employment
Transportation & Related Services	6	305	--	--	6	305
Wholesale/Distribution/Warehouse	3	94	--	--	3	94
Vehicle/Equipment Storage	1	3	1	--(c)	2	3
Manufacturing/Construction	--	--	2	40	2	40
Office	--	--	--	--	--	--
Retail/Restaurant	--	--	--	--	--	--
Arts/Design	--	--	--	--	--	--
Other	--	--	--	--	--	--
TOTAL	10	402	3	40	13	442

NOTES:

(a) Freight rail use is defined to include only those establishments with facilities in the project area actually served by rail. This table includes current freight rail users only. Other establishments either formerly used the rail or have plans to do so in the future. The project area also includes the Caltrain/SP commuter rail service and associated facilities.

(b) There are no freight rail users in the North of Channel subarea.

(c) The facility in the project area is used for materials storage only. The major activity and employment for this establishment is located on the nearby piers.

SOURCE: Recht Hausrath & Associates, Mission Bay Area Business Survey, 1985

Commuter Rail

The Southern Pacific Transportation Company under contract to CalTrans, operates the San Francisco/Peninsula commuter rail service out of the station at Fourth and Townsend in the North of Channel subarea. In addition to the train depot, there are other facilities related to the commuter function in the large rail area bounded by Fourth, Townsend, Seventh and King Streets. A total of 155 workers are based here, including managers, clerks, ticket takers, rail car cleaners, car knockers, policemen, train mechanics and electricians, enginemen and trainmen; this figure includes 18 concession sales workers who are not employees of the railroad but who occupy work space at the station.

Maritime-Related Activities

For the purposes of this study, "maritime-related" activities are defined as businesses that work with, or as part of, the water transportation industry. This includes marine repair services, maritime maintenance and equipment supply, cargo handling and storage, intermodal transport, and freight-forwarding and consolidation services. Maritime-related business thus includes some trucking, warehouse, and office establishments that might not generally be considered maritime activities, but are a part of the overall maritime transportation system linking the sales, transportation, and distribution of goods; this point is evidenced by the large number of Transportation businesses that reported a maritime connection, as discussed below.

The establishments and employment in maritime-related activities are shown in Table 4. It should be noted that maritime activity does not necessarily mean Port of San Francisco activity only. In fact, every establishment who reports using San Francisco facilities generally uses Oakland (or other Bay Area port facilities) more often.

TABLE 4

MISSION BAY PROJECT AREA SETTING - 1985
MARITIME-RELATED ESTABLISHMENTS AND EMPLOYMENT BY BUSINESS ACTIVITY AND LOCATION (a)

	LOCATION (b)					
	WEST OF THIRD		EAST OF THIRD		TOTAL	
Business Activity	Establishments	Employment	Establishments	Employment	Establishments	Employment
Transportation & Related Services	13	410	5	87	18	497
Wholesale/Distribution/Warehouse	3	13	2	19	5	32
Vehicle/Equipment Storage	2	3	2	--	4	3
Manufacturing/Construction	--	--	4	108	4	108
Office	8	39	--	--	8	39
Retail/Restaurant	--	--	--	--	--	--
Arts/Design	--	--	--	--	--	--
Other	--	--	--	--	--	--
TOTAL	26	465	13	214	39	679

NOTES:

(a) Maritime-related establishments are those in which all or part of the activity involves working with or as part of the maritime industry. This includes ship repair, ship maintenance/servicing, cargo handling and storage, intermodal transport, and freight-forwarding and consolidation services.

(b) There are no maritime-related establishments in the North of Channel subarea.

SOURCE: Recht Hausrath & Associates, Mission Bay Area Business Survey, 1985

The 39 establishments considered as maritime-related, and the 679 jobs associated with them, represent just over one-third of the project area's total establishments and employment. In terms of location within the project area, about two-thirds of both the maritime-related establishments and employment are west of Third Street. The 13 maritime-related businesses east of Third Street are just over half of the total of 25 businesses located in this area nearest the piers. There are no maritime-related establishments north of the Channel.

The largest number of maritime-related establishments (18 or 46 percent) and jobs (497 or 73 percent) are found in the Transportation business activity group. In fact, over half (58 percent) of all Transportation establishments, which account for 55 percent of that category's jobs, reported some form of maritime or port relationship. This fact is echoed in the preference Transportation and other business activity operations expressed for the Mission Bay area as an excellent location for maritime activity: close, or with easy access to, all major San Francisco port activities and relatively accessible (via fast freeways) to the Port of Oakland and other Bay Area maritime facilities. (In fact, one trucking firm stated that it even sold customers on their accessibility to Oakland--that, because of the reverse commute, they could provide faster service than some East Bay-based operations.)

Some of the businesses reporting maritime activity are more completely involved in that activity than others. Four of the transportation establishments are container freight stations; but three of these also engage in non-maritime transportation activity. Some truckers might use Port of San Francisco facilities as often as 25 times per day, whereas others report hauling only occasional containers or random usage. The five Wholesale/Distribution establishments report a wide range of Port of San Francisco usage from once a month to six times per day; similar broad usage ranges are found in the Vehicle/Equipment Storage, Manufacturing, and Office categories. Among the eight maritime-related establishments in the Office category, one-half report daily, weekly, or monthly Port contact (as cargo consolidators, importers, or inspectors),

whereas the other half have a very tangential relationship limited to one or two annual import/export shipments, which are only a small part of their total operations. The Port of San Francisco container piers (Piers 80 and 90-96) are the facilities reported as used most frequently by project area maritime-related businesses; Piers 15, 27, 28, 38, 48, 50 and 54 are used by fewer businesses.

Not all of the maritime-related establishments "take from" a port facility or are part of the maritime transportation system. Some participate early on in ship-building and repair, maritime equipment manufacture or supply, or maritime maintenance (e.g., tank transfer, hold cleaning).

LAND USE

Building Space and Land Area Used by Businesses

Table 5 shows the building space and separate land area used by business activity groups. These building and land area usage estimates correspond to the employment estimates in Table 1. (Table 5 does not show the total land area in the project area. Those estimates and a description of the overall use of the land are presented in Table 6.) In total, there are about 1.5 million square feet of building space in the project area. Just under three-quarters of this space is located west of Third Street. The small amount of building space (only about 15,000 square feet) north of the Channel is used by the commuter-rail facility and the San Francisco Recreational Vehicle (SFRV) Park. A number of major changes in the North of Channel area have determined its current character. They include the relocation of the commuter-rail station, freeing land for the SFRV Park; the construction of the I-280 freeway; and the recent demolition of the two freight sheds on Berry Street.

TABLE 5

MISSION BAY PROJECT AREA SETTING - 1985
BUILDING SPACE AND LAND AREA USED BY BUSINESSES (a)
BY USE AND LOCATION
(Thousands of Gross Square Feet)

	LOCATION															
	WEST OF THIRD				EAST OF THIRD (b)				NORTH OF CHANNEL				TOTAL (b)			
Business Activity	Building		Land		Building		Land		Building		Land		Building		Land	
	gsf	%	gsf	%	gsf	%	gsf	%	gsf	%	gsf	%	gsf	%	gsf	%
Transportation & Related Services (c)	602	54.8	364	43.9	211	51.3	348	30.2	9	62.5	839	64.1	822	54.0	1,551	47.1
Wholesale/Distribution/Warehouse	379	34.6	86	10.4	56	13.6	15	1.3	--	--	--	--	435	28.6	101	3.1
Vehicle/Equipment Storage	73	6.7	340	91.0	--	--	332	28.8	--	--	225	17.0	73	4.8	897	27.2
Manufacturing/Construction	--	--	--	--	86	20.9	289	25.1	--	--	--	--	86	5.6	289	8.8
Office	32	2.9	--	--	--	--	--	--	--	--	--	--	32	2.1	--	--
Retail/Restaurant	5	0.5	39	4.7	45	11.0	149	12.9	1	6.2	--	--	51	3.3	188	5.7
Arts/Design	6	0.5	--	--	--	--	--	--	--	--	--	--	6	0.4	--	--
Other (d)	--	--	--	--	13	3.2	19	1.7	5	31.3	248	18.9	18	1.2	267	8.1
TOTAL	1,097	100.0%	829	100.0%	411	100.0%	1152	100.0%	15	100.0%	1312	100.0%	1,523	100.0%	3,293	100.0%
Percent of total building Percent of total land	72.0%		25.2%		27.0%		35.0%		1.0%		39.8%		100.0%		100.0%	

NOTES:

(a) Land area represents land exclusive of buildings that is used by businesses in the Project Area.

(b) These figures include building space and land area on Parcels i and ii (see Map 1) which are not part of the Mission Bay Plan Area.

(c) Includes land and some buildings used by the commuter rail operation on the site. (Excludes the freight rail yards, which are listed in Table 6 in the rail use category.)

(d) Includes City fire station facility (land and building) and SF Recreational Vehicle Park.

SOURCE: Recht Hausrath & Associates

Businesses in the project area also use about 3.3 million square feet (74 acres) of land. In some cases, such as storage facilities, unimproved land area is the only space occupied by the business. In many other cases, businesses use both building space and associated land area as an extension of their interior activity or as parking. The North of Channel subarea contains the majority (40 percent) of the land area used by businesses. Four of the five businesses located in this subarea require open land area for their functioning, especially the CalTrain commuter-rail operation and the SFRV Park.

Transportation and Related Services, the largest group in terms of both number of establishments and number of employees, also occupies the highest percentage of project area building space (54 percent) and land area (47 percent). The Transportation group's total land usage figure is greatly inflated, however, by including approximately 20 acres in commuter-rail activity in the North of Channel subarea; without this, the category would use considerably less land overall and the Vehicle/Equipment Storage group would claim the largest percentage of the land area in use by businesses. (While the Vehicle/Equipment Storage category occupies a relatively large share of the project area land, it represents a small share of total project area employment, reflecting the low employment density of this activity.)

Over 80 percent of the total building space consists of truck terminals and warehouse facilities used by Transportation and Wholesale/Distribution/Warehouse business activities. The office space in the project area (all west of Third Street) is generally located in more improved parts of these same terminal/warehouse buildings. The Office and Arts/Design business activities do not officially use any land in the Mission Bay Project Area, but there is, as discussed later, informal land usage by these groups. The Retail/Restaurant category's higher ratio of land to building space reflects the amount of land devoted to parking at several of the establishments. In the case of the Manufacturing group, the higher ratio of land to building usage is explained by the two large ready-mix concrete plants, where most of the activity occurs outdoors.

Land Area by Use

In Table 6, the total land area in the Mission Bay Project Area is summarized by use according to the three major subareas. The table also accounts for the acreage of the China Basin Channel and developed street right-of-ways. (The table covers the EIR project area, including Parcels I and II which are not included in the Mission Bay Plan Area. [See Map 1.]) With close to two-thirds (63 percent) of the project area land in open usage (rail, parking lots, vacant), the area is not densely developed. That 71 acres is devoted to rails illustrates the area's historic tie to railroad transportation. As shown in Table 3, however, only 12 percent of the area's business establishments currently report rail usage.

The subarea west of Third Street has only one-third of its land area in business use with the remaining two-thirds in unbuilt usage (rails, unattended parking, vacant), confirming its generally open appearance. The subarea east of Third Street, with 55 percent of its area in business use, and only 16 percent vacant, is more intensely used. The North of Channel subarea is the smallest subarea and the least densely developed with less than one fourth of its land in active use by businesses.[1] The commuter-rail operation uses 40 percent of the land area north of the Channel.

The presence of vacant land and open space (78 acres, or almost one-third of the land area) is considered an attractive feature by many of the area businesses. When asked about the most important considerations in selecting a Mission Bay area location, the space factor was usually noted. Whether the business pays for the use of adjacent land or not, their activities generally extend into the uncrowded nearby streets or the abundant open lots; in one case at least a sub-lessee has use of an adjacent improved, enclosed yard at no additional charge. Thus, the estimate of land area in use by businesses would be higher if this unofficial usage were counted.

[1] In this table, the land area used by the commuter-rail operation is included in the rail use category, not in the category of land area used by businesses.

TABLE 6

MISSION BAY PROJECT AREA SETTING - 1985
LAND AREA BY USE AND LOCATION (a)
(Thousands of Gross Square Feet, with Acres in Parentheses)

Use	LOCATION: WEST OF THIRD		EAST OF THIRD		NORTH OF CHANNEL		TOTAL (b)	
	Land Area	Percent	Land Area	Percent	Land Area	Percent	Land Area	Percent
Land Area in Use by Businesses (c)	1,920 (44 acres)	33.2	1,537 (35 acres)	55.0	477 (11 acres)	22.6	3,934 (90 acres)	36.8
Rail Use (d)	1,403 (32 acres)	24.3	826 (19 acres)	29.5	848 (20 acres)	40.2	3,077 (71 acres)	28.8
Unattended Parking	84 (2 acres)	1.5	--	--	192 (4 acres)	9.1	276 (6 acres)	2.6
Rest of Land Area/ Vacant (excluding street right-of-ways)	2,373 (54 acres)	41.0	434 (10 acres)	15.5	593 (14 acres)	28.1	3,400 (78 acres)	31.8
Subtotal	5,780 (132 acres)	100.0%	2,797 (64 acres)	100.0%	2,110 (49 acres)	100.0%	10,687 (245 acres)	100.0%
Developed Street Right-of-Ways							2,570 (59 acres)	
China Basin Channel							523 (12 acres)	
GRAND TOTAL							13,765 (316 acres)	

NOTES:

(a) Land area includes land with buildings.

(b) The total land area figure exceeds that for the Mission Bay Plan Area by the inclusion of Parcels I and II east of Third Sreet (see Map 1).

(c) Corresponds to estimates in Table 5 of building space and land area used by businesses, with the exception of the commuter rail facility, which is here classified as land in rail use. The land area estimates in this table (Table 6) include the land area without buildings used by businesses (in Table 5), plus the land area on which the building space (also in Table 5) sits. The estimates are roughly correspondent, since they are derived from different sources: the business survey, lease information, and measurements from maps.

Length of Time in Project Area

The length of time that the various business establishments have been located in the project area is summarized in Table 7. Roughly two-thirds (65 percent) of 106 area business operations have been located there five years or less; exactly three-fourths (75 percent) have been there 10 years or less.[1]

If one looks at the duration totals by subarea, however, there is a marked contrast. The West of Third subarea clearly has the bulk of the newcomers to the area, with 58 (75 percent) of its 77 businesses having moved there within the last five years. The East of Third subarea has been more stable with only nine (38 percent) of 24 businesses moving there within the last five years. However, if the time period is extended to within the past ten years, the proportion of relative newcomers in the area east of Third jumps to 58 percent (14 businesses). The North of Channel subarea, with only five businesses spread across its 49 acres, likewise shows a broad spread in the length of time that businesses have been located there: from one to 70 years (the commuter-railroad operation). The major physical changes that have occurred over the years in the North of Channel area preclude many examples of continuity here.

The recent turnover of tenants west of Third Street reflects several interesting factors. One is the reaction of tenants to the announced plans for the Mission Bay Project. Another is a change in Santa Fe Pacific's rental policy in the area, in which basic rental rates were raised (though they remain below-market) and generally only short-term leases are now negotiated. The newer tenants are types of businesses that can accept the short-term nature of the lease in return for rents that are less expensive than those charged at alternative locations.

[1] Not all establishments responded to this part of the survey. The following discussion and numbers refer only to the 106 businesses (out of 113) who furnished information on this subject.

TABLE 7

MISSION BAY PROJECT AREA SETTING - 1985
NUMBER OF ESTABLISHMENTS BY LENGTH OF TIME IN PROJECT AREA, BY BUSINESS ACTIVITY (a)

Business Activity	LENGTH OF TIME (b)												Total
	Under 12 mos.		1- 2 yrs.		+2- 5 yrs.		+5- 10 yrs.		+10- 20 yrs.		20+ yrs.		
	#	%	#	%	#	%	#	%	#	%	#	%	
Transportation & Related Services	6	28.6	8	33.3	6	25.0	3	30.0	5	31.2	3	27.3	31
Wholesale/Distribution/Warehouse	4	19.0	7	29.2	2	8.3	2	20.0	3	18.8	2	18.1	20
Vehicle/Equipment Storage	3	14.3	7	29.1	3	12.5	1	10.0	2	12.5	1	9.1	17
Manufacturing/ Construction	--	--	--	--	1	4.2	2	20.0	3	18.8	1	9.1	7
Office	5	23.8	1	4.2	7	29.1	1	10.0	2	12.5	1	9.1	17
Retail/Restaurant	--	--	1	4.2	1	4.2	--	--	1	6.2	3	27.3	6
Arts/Design	3	14.3	--	--	4	16.7	--	--	--	--	--	--	7
Other	--	--	--	--	--	--	1	10.0	--	--	--	--	1
TOTAL	21	100.0%	24	100.0%	24	100.0%	10	100.0%	16	100.0%	11	100.0%	106
Percent of Total		19.8%		22.7%		22.7%		9.4%		15.1%		10.3%	100.0%

NOTES:

(a) Information for total of 106 establishments responding to this question.

(b) Length of time refers to total time in project area, including, for some establishments, one or more moves within the project area.

SOURCE: Recht Hausrath & Associates, Mission Bay Area Business Survey, 1985

If the overall age of individual business establishments is considered, there are several apparent groupings. Of the 69 total businesses that have moved into the project area within the last five years, only 18 (about one-quarter) are completely new businesses. (Only one of these is located east of Third Street.) There are three establishments that are newly-formed off-shoots of older businesses and 10 that are established businesses just starting their presence in San Francisco. The bulk (38 or 55 percent) of the relative newcomers to the project area are businesses which have been in San Francisco, but elsewhere in the City, for over five years at least (several for 50 years, one for 103 years), but which have found it beneficial or necessary to locate all or part their business operations in the Mission Bay area.

If the individual business activity groups are analyzed, substantial mobility (movement into the area within the past five years) is found in five groups: Arts/Design (100 percent), Office and Vehicle/Equipment Storage (both 76 percent), Wholesale/Distribution (65 percent) and Transportation (65 percent). Less recent movement is found in the Manufacturing/Construction and Retail/Restaurant categories. The suitability of the Mission Bay location and the building space there to a variety of uses is illustrated by the recent appearance of a group of artists/designers in the area. These are businesses which are using warehouse space as studio space; they do not have live-work studios.

All four of the area's eating establishments have been in the same location since they began, for durations of 18, 26, 30 and 35 years respectively. In fact, the business establishments which have operated in the area in the exact same location for the longest periods of time are the 35-year-old sandwich shop (Triangle Sandwich Shop) and the 30-year-old drive-in restaurant (Tic-Tock Drive-In) from this group. Two other establishments (H&H Ship Service Company--a ship maintenance business, and Paul F. Stefurak--an office) have also been in the project area for almost as long (35 and 30 years respectively) but have moved among several locations. Appropriately, the commuter-railroad operation has been in the project area longer than any other business establish-

ment (70 years) but has not operated continually in the same place; the 1915 station at Third and Townsend Streets was torn down, and a new depot built at Fourth and Townsend Streets, in 1977.

Overview of Changes in the Project Area

One of the pervasive themes of the business interviews was an awareness of change--that the area is going into a period of transition which is likely to alter its character significantly. The changes mentioned reflect overall patterns of economic activity, as well as shifts in activity peculiar to this location and surrounding areas in San Francisco, in addition to the reactions to proposed Mission Bay development plans.

The older businesses all cited a decline in maritime, trucking and warehousing activity which began around 15 years ago; the eating establishments have seen their clientele change gradually to include office and professional workers along with truckers and industrial workers. When the Mission Bay Project was first announced by Southern Pacific in 1981, many of the businesses without long-term leases became anxious about their future in this location. Some began immediately to make alternate plans. (One of the major trucking establishments is currently in the process of relocating its headquarters and most of its facilities.) Others decided to wait and see, but have observed (in the West of Third subarea especially, but also in the East of Third subarea on Port property) changes in their leasing arrangements (in terms of both duration and price). A notable turnover in businesses reportedly began about three years ago when SP first started to implement its "closer to market rate" rental policy. (This trend is illustrated in the data on lengths of time in the area in Table 7.)

When asked in the survey about their future plans, most establishments, whether new or old, responded guardedly that it all depended on what happened in the area. If given their choice, most said they would prefer to stay for several basic reasons: location/accessibility, space and still basically reasonable rents. The location of the area is seen

as an excellent one both in that it provides proximity to Port or downtown area customers, but also easy access (freeways, Bay Bridge, uncrowded local streets) for those operations who must come and go farther. Most businesses acknowledged the space factor, in terms of size of building facilities as well as open land and uncluttered streets/easy parking, as a definite area attraction. Rising rents are traded-off against these locational and space benefits.

Some of the newer firms could even be seen to be benefitting in the short-run from the area's transitional state. Businesses, especially larger ones, leaving the area free up additional space for new or rapidly expanding operations, if they can accept the short-term rental arrangement. There appears to be little uniformity in the shorter-term lease agreements--respondents, representing varied business activities, reported anything from 30 days to 5 years--but most businesses appear willing to accept the uncertainty given the relatively lower rents at this location.

In a preceding section, the range in size of businesses in terms of employment (from 265 to 0) was discussed. The preponderance of smaller (under 40 employees) operations is possibly a recent phenomenon for reasons already noted. The survey found a large number of firms (43 or 38 percent of the total of 113 establishments) who were sub-lessees or lessees of sub-lessees. There were 13 businesses who leased some of their space to others; one of these operations had 11 sub-lessees, another had eight among several different warehouses.

It appears that some of the relatively larger businesses (especially several trucking/warehouse operations) attract, or find it beneficial to furnish space for, smaller firms. The relationship may often be mutually useful, almost symbiotic. The larger company has some unneeded space they can lease to defray their increased rents; they maintain control over the space in case they need it for future expansion; and they have "built-in" customers. The smaller business is often one who can use their landlord's services (e.g., trucking, warehousing) or may provide a service for them (e.g. truck repair, cargo consolidation,

etc.) In fact, one trucking/warehousing operation even took its sub-lessees with it when it moved from one project area location to another.

In addition to movement in and out of the project area, there is also movement by the existing businesses within the area as their business conditions change or the opportunity presents itself. There are a variety of examples of this phenomenon. One newer, growing trucking concern is taking over warehouse space vacated by another trucker leaving the area. One warehouse/distributor took office space in the area until the warehouse they wanted was available. Several firms were displaced by SP's recent demolition of the warehouses on Berry Street (in the North of Channel subarea), and were assisted by SP in relocating across the Channel into the central project area (West of Third subarea). Another trucking operation moved several blocks in the central area west of Third because of a better sub-lease arrangement. Movement has also occurred between the West of Third and East of Third subareas; one West of Third trucker moved 15 years ago east of Third Street to take a large facility vacated by a neighboring trucker, who moved to smaller quarters across the street. A large vehicle storage operation is now giving up two sites west of Third to consolidate all of its operations east of Third in the large facility now being vacated (after 15 years) by the aforementioned trucker. Two of the oldest business establishments in the area have moved several times within a three block radius over the course of 30 years.

There are 12 establishments (11 percent of the 113 total establishments) who currently have space at more than one site or facility in the project area. This arrangement generally consists of an office in one place with a yard or warehouse at another location; in one instance it is two parking lots; there are two examples of trucking firms having several warehouses or warehouse spaces in different locations within the project area.

COMPARISON TO PREVIOUS ESTIMATES OF PROJECT AREA BUSINESSES AND EMPLOYMENT

For environmental evaluation of the earlier Mission Bay planning effort in 1982, a survey of Mission Bay Project Area businesses was undertaken. Estimates from that survey indicated a total of 32 establishments and 734 employees located in the Mission Bay site. There are several explanations for the difference between this and the 1985 estimates (113 establishments and 2,001 employees). First, the project area for the current effort has been expanded to include property east of Third Street to China Basin Street, so, by definition, more businesses are included. Second, the survey approaches differed. The first survey consisted of a mail-out-mail-back questionnaire, and it appears that only those who responded were included in the estimates. For the 1985 survey, an effort was made to contact and get responses from all identifiable businesses. This included significant work on-site, to identify and survey the many sub-tenants. The first survey only identifies the primary Southern Pacific tenants.

Other external factors could explain the differences. Between 1982 and 1985, there was a change in Southern Pacific's approach to managing the property west of Third Street and north of the Channel. According to the Santa Fe Pacific property manager for the area, a rental survey was conducted in 1983, with the result being that rents for space in the project area (Southern Pacific properties) were raised 150-300 percent over the rates negotiated prior to 1983. Short-term leases are now negotiated for $.20-$.30 per square foot. These rates are below-market, according to the property manager, but only negotiated on a short-term basis. The rental increase in 1983 brought about some turnover among the shorter-term tenants and longer-term tenants whose favorable leases expired, which explains some of the differences between the 1982 and 1985 surveys. In addition, a more aggressive leasing attitude has brought in new tenants, willing to trade-off the short-term lease with rental rates that remain below the market rate for similar space elsewhere in the South of Market industrial areas. Many of these newer

tenants are small, independent trucking and distribution operations whose location decisions in recent years have also been influenced by deregulation and unionization factors. It is also clear from the business survey that sub-leases to small office and other start-up operations have proven to be a means of keeping the existing space occupied, in the face of declining warehouse and storage space needs of the primary tenants.

CHARACTERISTICS OF JOBS IN THE MISSION BAY PROJECT AREA

This section describes the jobs in the project area, as reported in the Mission Bay Business Survey, in 1985. Jobs are described in terms of both occupations and wages and salaries. Table 8 shows the occupation distribution for jobs in the Mission Bay Project Area. (Appendix B provides a description for each occupational group.) Both the total and the distributions for four major business activities are shown. [In these and subsequent tables, the industrial-type activities (transportation, distribution/warehouse, storage, and manufacturing/construction) are grouped together since they have similar characteristics.]

Overall, there is a considerable mix of occupations in the project area. The largest single group is the operatives category. Most of these jobs are in the industrial business activity, primarily truck drivers (including independent owner-operators) and delivery workers. The next largest occupational group is the sales category. One large establishment (the Esprit sales outlet) accounts for the majority of these jobs. There are about equal proportions of managerial and clerical jobs. These represent primarily the management and associated record-keeping functions of the many different types of establishments in the project area. There are a substantial number of jobs in the category for other occupations, representing primarily workers in warehouses, movers, and inventory/stock clerks. The smallest occupational groups are skilled crafts, services, and professional/technical. Most of these jobs are in businesses classified as industrial.

TABLE 8

MISSION BAY PROJECT AREA SETTINC - 1985
OCCUPATION AND WAGE/SALARY DISTRIBUTIONS OF JOBS BY BUSINESS ACTIVITY

Occupations (a)	Total Mission Bay Project Area Jobs, 1985 No.	%	Industrial (b) %	Office %	Retail %	Arts/Design/Other %
Professional/Technical	69	3.4	3	15	--	38
Managerial/Administrative	221	11.1	10	27	10	14
Clerical	235	11.8	11	24	12	--
Sales	385	19.3	10	20	68	14
Service	101	5.0	4	1	10	34
Skilled Crafts	119	5.9	7	6	--	--
Operatives	696	34.8	44	7	--	--
Other	175	8.7	11	--	--	--
Total	2001	100.0	100	100	100	100
Wages and Salaries (1985 Dollars)						
Less than $12,000	307	15.4	7	11	63	14
$12,000-14,999	181	9.1	10	11	--	48
$15,000-24,999	649	32.4	33	39	30	29
$25,000-49,999	800	40.0	47	23	7	9
$50,000-74,999	49	2.4	2	14	--	--
$75,000 and above	15	0.7	1	2	--	--
Total	2001	100.0	100	100	100	100
TOTAL JOBS BY BUSINESS ACTIVITY	2001		1581	106	298	21

NOTE: The occupation and wage/salary distributions shown in this table are the results of the 1985 Mission Bay Area Business Survey. The information was collected as part of the employer interviews. The detailed results by business activity are presented to highlight differences among groups. The overall pattern is more accurate than any one percentage.

(a) Appendix B provides a description for each occupational group.

(b) The industrial business activity includes: transportation and related services, wholesale/distribution/warehouse, vehicle/equipment storage, and manufacturing/construction.

(c) The retail business activity includes both retail stores and restaurants. The largest establishment in this category did not provide wage and salary information, so the wage and salary distribution shown here for retail reflects only the combined results for the small restaurants and coffee shops in the project area and one other small retail establishment. If information from the largest retail employer were available, the combined distribution might indicate somewhat higher wages and salaries. The distribution would be likely to continue to be weighted towards the lower categories, however.

SOURCE: Recht Hausrath & Associates, Mission Bay Area Business Survey

Although most jobs of all types are in the industrial group, the occupational distribution of jobs in each business activity is different and reflects the primary business function associated with each activity. Jobs in the operatives and other categories dominate the industrial activities, along with associated administrative and management positions. Clerical, sales, and skilled crafts positions are also relatively important in this group. Management, clerical, and sales positions characterize the office group. The relatively low proportion of professional/technical jobs compared to managerial and sales jobs reflects the nature of the small, independent offices located in the project area. Several are involved in import/export and cargo consolidation activities. They are different from professional services offices, primarily located in the central downtown area. The retail business activity is dominated by sales occupations, as expected. The Arts/Design/Other group is a mix of artists/designers (professional/technical jobs) and the managerial, sales, and service jobs associated with the SFRV Park.

Table 8 also shows the distribution of project area jobs by wage and salary in 1985. Overall, wages and salaries tend to cluster in the $15,000 - $49,999 range, with 72 percent of the jobs in this group. Jobs paying less than $15,000 account for 24 percent of all jobs in the study area (probably including many part-time positions), while those paying $50,000 and above account for three percent of total jobs.

There are differences in the distribution of jobs by wage and salary category across the four business activities. The industrial activities have the highest percentages of jobs at the highest end of the distribution. This may reflect wages set by union agreements. Jobs in the office business activity cover the the full range of wage and salary categories. More than half of the jobs in the retail business activity are at the lowest end of the wage and salary scale. Many of these are probably part-time jobs. The relatively small number of jobs in the Arts/Design/Other category are somewhat higher-paying, but fall near the lower end of the range.

RESIDENCE PATTERNS OF WORKERS IN THE MISSION BAY PROJECT AREA

Residence patterns describe where those who work in a certain place (the Mission Bay Project Area, in this case) live. In the 1985 Mission Bay Area Business Survey, a representative of each establishment was asked to provide information on where the workers at that establishment lived. The representative was asked to provide either the number of workers or the percent of total workers living in each Bay Area county or beyond the Bay Area. In most cases, these estimates are rough approximations. Some businesses were unable to provide the information; therefore, the residence patterns from the responding establishments were calculated for each business activity group and the resultant percent distributions were applied to the total estimate of workers in each business activity.

Table 9 shows the overall distribution of Mission Bay Project Area workers by place of residence, as well as the residence patterns distributions for the different business activities. Overall, about one-half (49 percent) of the workers live in San Francisco. San Mateo County ranks second with 20 percent of the workers. Alameda County follows with just over ten percent of the workers. Less than ten percent of the project area workers live in each of the other counties, with the most in Contra Costa and Marin Counties (with about eight and six percent, respectively).

The overall residence patterns vary somewhat by business activity. The largest group of industrial activities sets the overall pattern. Retail workers have a substantially higher proportion living in San Francisco and a lower proportion in the South Bay counties. Office workers show the lowest share living in San Francisco and the highest share in the North Bay counties. All of the workers in the Arts/Design/Other category live in San Francisco. (The studio space in the Mission Bay Project Area is not live-work space; the artists live elsewhere in San Francisco).

TABLE 9

MISSION BAY PROJECT AREA SETTING - 1985
RESIDENCE PATTERNS BY BUSINESS ACTIVITY

County of Residence	BUSINESS ACTIVITY									
	Industrial (a)		Office		Retail (b)		Arts/Design/Other		TOTAL	
	#	%	#	%	#	%	#	%	#	%
San Francisco	731	46.2	46	43.4	182	62.1	21	100.0	980	49.0
East Bay	324	20.5	19	17.9	55	18.8	--	--	398	19.9
Alameda	189	12.0	9	8.5	27	9.2			225	11.2
Contra Costa	116	7.3	9	8.5	28	9.6			153	7.7
Solano/Napa	19	1.2	1	0.9	--	--			20	1.0
South Bay	397	25.1	26	24.5	30	10.2	--	--	453	22.6
San Mateo	354	22.4	24	22.6	30	10.2			408	20.4
Santa Clara	43	2.7	2	1.9	--	--			45	2.2
North Bay	114	7.2	11	10.4	26	8.9	--	--	151	7.6
Marin	92	5.8	8	7.6	26	8.9			126	6.3
Sonoma	22	1.4	3	2.8	--	--			25	1.3
Other	15	1.0	4	3.8	--	--	--	--	19	0.9
TOTAL	1581	100.0%	106	100.0%	293	100.0%	21	100.0%	2001	100.0%

(a) The industrial business activity includes: transportation and related services, wholesale/distribution/warehouse, vehicle/equipment storage, and manufacturing/construction.

(b) The retail business activity includes both retail stores and restaurants.

SOURCE: Recht Hausrath & Associates, Mission Bay Area Business Survey

The differences in residence patterns among the business activities reflect a combination of many interrelated factors. These include the occupational and wage/salary characteristics of the jobs held by workers in each group. They also include the demographic and household characteristics of the workers employed in different jobs, as well as accessibility from home to work and the types of transportation available to the workers.

PART II: MISSION BAY PROJECT AREA HOUSEBOAT RESIDENTS AND PLEASURE BOAT ACTIVITY, 1985

INTRODUCTION

The only residents of the Mission Bay Project Area live in the houseboat community on the China Basin Channel at Wharf 60 on the northern side of Channel Street. Interspersed among the houseboats are a number of mobile craft/pleasure boats.

The residents and boat users of what was formerly referred to as the Channel Marina formed the non-profit Mission Creek Harbor Association in 1977 to represent their mutual interests in negotiations with their landlord, the Port of San Francisco, and other relevant public jurisdictions [City and County of San Francisco, Bay Conservation and Development Commission (BCDC)]. The Harbor Association uses a 1200 foot long section of the Channel where the boats are berthed as well as the southerly adjacent strip of land (approximately 100,000 sq. ft.) and a paved inset portion of Channel Street; all of this area is controlled by the Port. A permit issued by the BCDC states the number and types of craft that can occupy the Harbor; there is now approval for a maximum of 20 houseboats ("live-aboards") and 35 mobile craft. The houseboats are connected to City and County of San Francisco water and sewage lines.

The Port charges the Harbor Association a flat monthly rent for the use of Wharf 60 and the adjacent land. The Association collects fees from each of its members based on the size (linear feet) of the berth(s) which they sub-lease; each houseboat berth has an additional set surcharge. Out of the fees received from the membership, the Association, through its Harbormaster, pays all joint fees: rent to the Port; proprietary use tax and water and sewer surcharge fees to the City and County; garbage and portable restroom maintenance fees to private contractors; and various Harbor upkeep costs (e.g., dock maintenance).

The Association governs itself through its appointed Harbormaster and five person Steering Committee, made up of houseboat and mobile craft representatives; this group meets on a monthly basis. In addition to setting and collecting fees, the Steering Committee also handles matters of mutual concern (general maintenance issues, such as green space cleanup or electricity repair) or Harbor property violations. Members of the Association may be fined for various infractions including littered or overly heavy finger-piers, overlength boats, unconnected sewer lines, "sneak-aboards" (setting up a household without "live-aboard" status), etc.

With the cooperation of the Harbormaster and the Steering Committee of the Mission Creek Harbor Association, Recht Hausrath and Associates (RHA) conducted a survey of the Mission Creek Harbor boating population in February/March, 1986. As stated earlier, the Mission Creek Harbor officially contains 20 berths for houseboats and 35 berths for mobile/pleasure craft. The mailing list of the Harbormaster was used to reach the relevant berth users. The survey was a mail out/mail back questionnaire. Included in the houseboat questionnaire were basic questions on the numbers of people in residence, length of time in the area, demographics, approximate income, employment, commute mode, etc. The members of the mobile craft group received an abbreviated questionnaire asking about the location of their primary residence, length of time using the Harbor, boat usage and movement, and transportation to the area.

MISSION CREEK HARBOR HOUSEBOAT RESIDENTS

Overview

Of the 20 houseboats in the Mission Creek Harbor in March, 1986, 17 are being used by their owners and three are rented. The total houseboat resident population is 34, including two partners of one houseboat, who are part-time residents, and a couple living elsewhere while their houseboat is being rebuilt.

In the RHA survey mailed to all houseboat households, 17 households responded, for an 85 percent response rate. The responding households represented 29 individuals (including two children), or 85 percent of the total population. Of the responding households, 15 (88 percent) reported the houseboat as their primary residence. Two households (12 percent) stated they resided elsewhere; one of these households lives in San Francisco; the other consists of two individuals who spend a fair amount of time on their houseboat but whose official residences are, for one, in Mill Valley, and the other, in Greenwich, Conn.

Length of Residency

Most of the responding houseboat residents (26 or 90 percent) have come to the Mission Creek Harbor area in the past ten years. Over half of the respondents (16 or 55 percent) have moved there within the last five years. One respondent has lived there for 12 years, and two respondents have lived there for over 20 years (24 and 27 years respectively).

Household Composition

On average, each houseboat has more than one resident. The average number of persons per household is 1.7. Of the responding households, six (35 percent) are single individuals; 14 (41 percent) consist of two individuals; and three households (18 percent) are composed of three individuals. One houseboat was temporarily empty at the time of the survey.

Age and Race

The bulk of the responding residents (15 or 52 percent) are between the ages of 25 and 44 years; about half of these are between 25-34 years old and the other half are between 35-44 years old. One resident is in the 18-24 year-old category, and two are in the 11-17 year-old group; two babies are also expected this year. Three residents (10 percent of the respondents) are reported between 45-54 years, five residents (17

percent) are between 55-64 years, and three (10 percent) are over 65 years. Except for one resident of Asian descent, all of the other residents are white.

Household Income

The 16 households who supplied information on their approximate 1985 income show a broad range and fairly even spread across income levels as follows:

Less than $12,000	$12,000-$14,000	$15,000-$24,999	$25,000-$49,999	$50,000-$74,999	$100,000 & above
3 (19%)	3 (19%)	3 (19%)	4 (25%)	2 (12%)	1 (6%)

Motor Vehicles

With a total of 32 motor vehicles reported, there are, on average, about two motor vehicles per household. The types of motor vehicles mentioned included cars, trucks and motorcycles. Just under half (seven or 44 percent) of the responding households stated they had one motor vehicle; six households (38 percent) reported two motor vehicles, two households (12 percent) reported three vehicles, and one household (6 percent) reported seven vehicles (three cars, two trucks and two motorcycles). The Channel Street parking area is used by everyone.

Employment

Almost three-quarters (21 or 72 percent) of the responding houseboat residents are employed. Two-thirds of the workers (14 residents) work full-time and one-third (seven residents) work part-time. The eight residents who do not work include five retirees, two children, and one adult not working at this time.

The employed houseboat residents represent a wide range of occupations and job descriptions. The largest occupational grouping among the responding residents was the professional/technical category; the six workers (29 percent of the employed residents) in this group include a civil engineer, two physicians, a tele-communications technician, a designer/media journalist and a photographer. There are two residents in each of the following categories: manager/administrator, clerical, service, and other laborer; the specific jobs reported are restaurant owner, construction supervisor, stock clerk, bank customer service representative, restaurant worker, bartender, grocery store stocker and display person. The crafts and sales categories each have three residents; in crafts occupations include a carpenter, exhibit stager and electrician; the sales group includes a realty agent, grocery store clerk and gift center hostess. There is only one responding resident, a truck driver, in the operative category.

Over two-thirds of the employed respondents (15 or 71 percent) work in San Francisco; they are distributed as follows by location within the city: three in the Mission Bay area, three in the South of Market, two in the Mission, two in the Western Addition, two in Downtown, one in the Avenues and two unspecified. Four of the employed residents (19 percent) report variable work locations (in San Francisco or elsewhere in the Bay Area). The two non-permanent residents report work locations in Albany and Mill Valley.

The range of work arrival and departure times reported cluster over three-hour spreads in the morning (7:30 - 10:30 AM) and evening (4 - 7 PM), with five respondents stating they work variable hours. About four-fifths of the working respondents (17) use a car or other motor vehicle to get to work and the rest walk.

MISSION CREEK HARBOR MOBILE CRAFT POPULATION

There are 35 boat/mobile craft berths in the Mission Creek Harbor. At least four of these are rented by members of the houseboat population to berth their mobile/pleasure craft.

Of the questionnaires sent out by RHA, 19 were returned, for a response rate of 54 percent. Over three-fourths of the respondents (15 or 79 percent) stated they lived in San Francisco and three others (16 percent) reported nearby Peninsula addresses (San Bruno, San Carlos, San Mateo); the remaining respondent lives in Mill Valley.

The majority of the boating population (10 or 53 percent) have had their berths between 7-12 years; seven respondents (37 percent) have had their berths under five years and two (10 percent) have had them for 17 years.

Varied amounts of boat usage were reported, with probably more weekend usage. Generally, the respondents commented that usage depends on the weather and the seasons. Almost all of the respondents (16 or 84 percent) stated they used cars to reach the Harbor if they were not already living there; one noted they sometimes used Muni and another said they might use a boat. The majority of respondents (10 or 56 percent) said their boating party usually involved two cars coming to park near the Harbor; six (34 percent) reported one car coming and two (12 percent) reported three cars coming to the Harbor area. All reported the Channel Street parking as the place where cars were kept.

APPENDIX A

DESCRIPTION OF BUSINESS ACTIVITIES IN MISSION BAY PROJECT AREA

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A. Transportation and Related Services: trucking and other freight and passenger transportation functions, including associated warehousing, repair and maintenance, and dispatch services.

- trucking, drayage and warehousing companies*
- passenger transportation services, including commuter rail, bus, and shuttle bus operations
- moving and storage operations
- repair, rental, and maintenance services to the maritime freight, and passenger transportation industries*

B. Wholesale/Distribution/Warehouse: wholesale sales, warehouse and delivery functions primarily for own account.

- wholesale sales, distribution and warehousing for:

  food and beverage products*
  electrical equipment and supplies*
  furniture*
  paper products
  office products and supplies
  motor vehicles
  apparel and general merchandise
  miscellaneous consumer products*
  construction materials*

C. Vehicle/Equipment Storage: storage functions only, including those of repair, sales, transportation and other businesses.

- motor vehicle storage (buses, trucks, autos)
- wrecking yards
- salvage yards
- equipment and materials storage for building and other contractors*

D. Manufacturing/Construction: on-site production or processing functions.

- building materials processing
- manufacture of maritime and other industrial equipment and supplies*
- food processing (coffee)*
- manufacture of displays and specialty fixtures

E. Office: administrative, management, clerical and professional functions.

- import/export brokers*
- freight forwarders, shipping agents and cargo consolidators*
- cargo inspectors*
- general offices of contractors, trucking companies, distributors

F. Retail/Restaurant: retail stores and eating and drinking establishments.

- apparel manufacturer's sales outlet
- coffee shop, diner, drive-in, cafe
- marine equipment and supplies*

G. Arts/Design: artists and designers studios/workshops (currently no live-work activities in project area).

- fine artists
- custom printing/intaglio and graphic design workshops
- custom apparel design

H. Other: miscellaneous functions that do not fit easily in other categories.

- San Francisco Recreational Vehicle Park
- Vacant City Fire Station

NOTE: Businesses are categorized into business activity groups according to the primary function performed on site.

*Identifies categories of businesses where some or all establishments are maritime-related.

APPENDIX B

DESCRIPTION OF OCCUPATION CATEGORIES

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The classification of jobs by occupation is based on the Standard Occupational Classification system used by the U.S. Census. The eight major categories used in this analysis are presented below with examples to describe the types of jobs classified in each group.

- Professional or technical worker: accountant, architect, computer specialist, writer, lawyer, social worker, performing artist, medical personnel, labor or personnel relations.

- Manager of Administrator: bank officer or financial manager, buyer or shipper, or any type of office, personnel or sales manager.

- Clerical worker: bank teller, counter clerk, bookkeeper, administrative assistant, vehicle dispatcher, receptionist or secretary, typist or keypunch operator.

- Crafts worker: carpenter, printer, electrician, mechanic, automobile or boat repair.

- Operative worker: machine operator, crane operator, truck or bus driver, clothing presser, or dressmaker.

- Sales worker: sales clerk, real estate agent or broker, insurance, stocks or bond seller.

- Service worker: cleaner, janitor, waiter or waitress, cook, police or detective, security guard.

- Other: laborers, not elsewhere classified, such as construction laborer, freight mover, packer, stock handler, vehicle washer or equipment cleaner, or warehouseman (other than clerical).